

IOWA DEPARTMENT OF ADMINISTRATIVE SERVICES ▼

HUMAN RESOURCES ENTERPRISE

REVENUE AGENT 1

DEFINITION

Under immediate to general supervision, performs investigative work in the administration of tax laws in a training capacity in a field assignment or in a permanent assignment within a service unit using telephones; performs related work as required.

The Work Examples and Competencies listed are for illustrative purposes only and not intended to be the primary basis for position classification decisions.

WORK EXAMPLES

Investigates business establishments through field inspections to determine if tax has been paid, to learn the correct procedure for this assignment, to check for the display of proper licenses, and to report changes in ownership by studying, and receiving formal instruction on, applicable tax laws, rules, and regulations and auditing techniques and observing experienced agents.

Locates taxpayers to attempt to collect delinquent taxes and money for returned checks through all applicable sources.

Answers questions of the general public to acquaint and help them with tax matters by explaining provisions of state tax laws, rules, and procedures.

Investigates claims for property tax exemptions, credits or reimbursements to determine if these claims are correct by examining public records of deeds, contracts, estate files, marriage and death records, military separation papers, and county and/or city tax records.

Initiates legal action to learn to enforce compliance with tax laws by serving distress warrants, assisting local law enforcement officials in seizure and sale and negotiating with taxpayers, their representatives and their employers for deferred and partial payment agreements.

Assists taxpayers in order to assure completeness and the filing of state tax returns including non-complex individual income tax returns either in person or by telephone by making computations of taxes, interest, and penalties for current and delinquent taxes in accordance with established policies and procedures.

Prepares progress and final reports in order to explain the status of, or recommend disposition of cases by compiling and documenting information.

Investigates public records of deeds, contracts, estate files, death records, and/or bank records in order to learn to determine if property transfers may be subject to inheritance tax.

COMPETENCIES REQUIRED

Ability to write factual narrative and data based reports about tax cases.

Ability to understand forms, requirements and procedures involved in computing and filing taxes.

Ability to understand complex procedures required to implement tax laws.

Ability to understand sections of the Iowa Code pertaining to tax collection in order to accurately collect, verify and record information pertaining to tax case.

Ability to make logical and accurate decisions based on interpretations of agency and state rules and regulations and data obtained from interviews.

Ability to obtain necessary information tactfully and diplomatically.

Ability to exercise sound judgment in determining conformity to tax laws, rules, and regulations.

Ability to "catch on" or understand instructions and underlying principles.

Ability to reason and make judgements.

Ability to comprehend language and to understand the meaning of words, as well as to use them effectively.

Ability to understand the relationships between words and to understand the meanings of whole sentences and paragraphs.

Ability to perform arithmetic operations quickly and accurately.

Displays high standards of ethical conduct. Exhibits honesty and integrity. Refrains from theft-related, dishonest or unethical behavior.

Works and communicates with internal and external clients and customers to meet their needs in a polite, courteous, and cooperative manner. Committed to quality service.

Displays a high level of initiative, effort and commitment towards completing assignments efficiently. Works with minimal supervision. Demonstrates responsible behavior and attention to detail.

Responds appropriately to supervision. Makes an effort to follow policy and cooperate with supervisors.

Aligns behavior with the needs, priorities and goals of the organization.

Encourages and facilitates cooperation, pride, trust, and group identity. Fosters commitment and team spirit.

Expresses information to individuals or groups effectively, taking into account the audience and nature of the information. Listens to others and responds appropriately.

EDUCATION, EXPERIENCE, AND SPECIAL REQUIREMENTS

Two years of public contact work experience obtaining, analyzing and/or evaluating data;

OR

an equivalent combination of education and experience substituting thirty semester (or equivalent) hours of accredited undergraduate level college course work for one year of the required work experience to a maximum substitution of two years;

OR

employees with current continuous experience which included eighteen months of substantive clerical work using independent judgement at the Clerk Advanced level or above, involving public contact in the Department of Revenue shall be considered as qualifying.

NECESSARY SPECIAL REQUIREMENTS

Some positions within the Department of Revenue require an applicant to have the ability to pass a background investigation conducted by the Department of Public Safety.

Designated positions may require travel and that employees provide their own transportation to and from work sites.

Effective Date: 4/88 BA